
Subject: Certification Visit

Effective Date: August 1, 2006

Revised from: October 1, 2004

Policy: At the certification visit, an applicant is:

- Required to be present for the appointment unless certain criteria are met.
- Certified at no cost to the applicant.
- Screened for categorical, residential, financial and nutritional eligibility.
- Asked to provide proof of identity for applicant (and caregiver identity for infant and child applicants), residency, and income.
- Offered the opportunity to register to vote (or caregiver of minor applicant.)
- Provided with nutrition education and referrals.
- Informed that s/he is eligible/ineligible to receive WIC benefits and provided with benefits, if eligible.

Reference: CFR §246.7

Procedure:

1. Refer to the other policies in the PPM Certification section for details.
2. If an applicant is eligible to receive WIC benefits:
 - a. She/he is enrolled into the Program for the appropriate certification period.
 - b. Client Rights and Responsibilities are explained and the form signed by the client or parent/legal guardian. (Refer to CRT 03.02.00 Client's Rights and Responsibilities for the policy and the to Forms section for the English and Spanish forms.)
 - c. A food package is tailored to his/her needs.
 - d. Basic nutrition education is provided and a follow-up nutrition education appointment is scheduled.
 - e. Referrals are made to appropriate medical or social services.
 - f. A WIC Program Identification Card/Check Folder is issued (after documentation of proof of identity for caregiver/adult client.)

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- g. WIC checks for the prescribed foods are issued and check usage instructions are provided.
- 3. The Caregiver is the pregnant, breastfeeding, or postpartum woman herself; or a parent of an infant or child. If not a parent, the caregiver would be a person who is legal guardian or someone with a temporary legal custody.
- 4. An Alternate Caregiver may be named for the client and is encouraged. A family member or someone involved in the care of an infant or child is preferred.
 - a. The Alternate Caregiver is allowed to pick up checks at the clinic and use them at the grocery store.
 - b. The Alternate Caregiver must abide by the same rules and regulations as the Caregiver. It is the responsibility of the Caregiver to inform the Alternate Caregiver of this policy.
- 5. Health Department personnel should not be listed as Caregivers or Alternate Caregivers unless they are the client or parent/guardian. (See PRI 06.00.00 Conflict of Interest.) They may serve as proxies in limited cases. (See FCI 04.02.00 Proxies and Proxy Cards.) Clinic staff should contact the State Agency for guidance if there are questions regarding specific situations when a clinic staff person may act as a proxy.
- 6. If an applicant forgets to complete the Food Record before the appointment time, the clinic may choose to:
 - a. Have the CPA complete the form during the assessment; or
 - b. Give the applicant opportunity to complete the form and wait for the next available opening that day or be rescheduled.
- 7. Documentation of residency, income, identity of client (and caregiver for infant and child clients) is required for each certification.
 - a. If a person misunderstands or forgets to bring documentation to the certification appointment, the lack of documentation does not stop the certification process.
 - ◆ Eligibility should be determined based on the information the client or caregiver provides at the appointment. If found eligible based on this information, certification can proceed.
 - ◆ Benefits will not be withheld because documentation is not provided at the certification appointment.

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- ◆ One month's of checks may be issued. KWIC will not allow more checks to be printed until the missing proof/s are documented.
- ◆ The appointment letter for the next month should include a reminder to bring the necessary proof/s.
- b. The clinic may certify applicants when **no** proof of identity, residency and/or income exists. Example situations include when an applicant or caregiver is the victim of theft, loss, or disaster; a homeless person; or a migrant farmworker.
 - ◆ The clinic must require the person to confirm his or her identity (or child's identity), residency, and/or income in writing using the appropriate Self Declaration form.
 - ◆ This form prints if the "Self Declared" box is marked for Proof of Identity, Residency, or Income in KWIC.
 - ◆ If multiple family members are self-declaring for proof of income, clinic staff may write additional family member names on one Self Declaration of Income form. The same can be done for the Self Declaration of Identity and Self Declaration of Residency forms.
 - ◆ Self Declarations must contain reason for "No Proof", applicant signature, and WIC staff signature.
 - ◆ Retain the Self Declaration/s attached to the client's Rights and Responsibilities form for this certification.
- 8. KWIC documents most of the client record electronically. A few items are required to be retained.
 - a. Items that must be retained for all clients include:
 - ◆ Signed Rights and Responsibilities
 - ◆ Food Recall
 - ◆ Check stubs
 - b. If completed for a client, the following forms must be retained:
 - ◆ Voter Declination
 - ◆ Special Formula Issuance
 - ◆ Self Declaration of Income
 - ◆ Self Declaration of Identity
 - ◆ Self Declaration of Residency